

Trackplan^{FM}

Release 17th & 18th December 2024

SUMMARY

Key Features & Improvements:	
Main Web Application – Key features and improvements	Ref.
Google Single Sign On enabled on main login page	2066
Stock Requests and Stock Transfers	2327
API – Endpoints added for sites	2435
Resource Upload – can now upload trades, regions and grade for each resource	1774
Resource Details - The design is improved along with Resource Types	2505
Location Type filter now added to location and sublocation lists	2302
When editing a job can now change the main instructed task	2025
SFG20 integration – Comprehensive library of Planned maintenance schedules and checklists. Can be imported into Trackplan.	855
Planned Schedule Items – can set costs per each items attached to schedule	1592
Asset – Feature Image. You can now flag an asset image as a featured image. This will the display on the asset details page in the main application and on the app	1181
App – Key features and improvements	Ref.
Resource can add and reassign other resources and reassign on a job task	2244
Stock – can restrict which storage areas a resource can access	2246

Other Improvements:	Ref.
Main Web Application – Other improvements	
Contractor Portal – Quote documents accessible for contractors	2459
Assets can now be set to operational or non-operational	2221
On tasks can now see who completed the task	1111
Resource can now be displayed on emails sent on job and task assignment to user	2458
Request List – Approve by and decline by columns added	2353
Job List search by resource – can now search the job tasks as well	2397
Resource adds a note – can choose when to receive notification email by resource	1970
Due Date – When changing due date can choose whether to update expected dates	1991
Job List – Quick Actions – Can now reassign job to another user	1960
Planned Schedule Upload – Job Category added to this upload	2433
Planned Schedule Details – Finance codes can now be added to planned schedule	2351
Planned Schedules – Ignore weekends now obeyed for jobs booked in future.	2515
Planned Schedules – changing the frequency will update attached items	2026
Planned and Reactive Dashboards – job count by resource now shows correctly	2249
Email sent to contractor when task overdue can now include weblink to portal.	2464
Job List - Asset Count added as a hidden column	2555
Forms – If form has only one section, it auto expands to display all questions	2495
Job List – Asset Count available as column on the job grid (hidden by default)	2555
Location Upload – Can now upload longitude and latitude	2579
Job Substatus – Changing a job’s substatus can trigger an email notification	2494
Job List – Asset Count can now be added as a column for each job	2555
Job Email notifications – emails sent out on key job event respect the user’s access to sites, locations etc.	2553
Reports – GPS Site coordinates added to job, asset and site reports	2437
Single Sign On – Can now set up multiple tenants	2587
Forms – When scanning a Form’s QR code a new instance of that form is brought up. It will now ask for the job number	2493
Job – Printing to PDF – can now include the sublocation code	2574
Reports- First time fix and Attendance on time KPIs now added to the job and job task report	2448
Forms – text questions – the height of the input box has been increased	1650

Job Type – this will not display on the job task page on the contractor portal and the job type code can now be included on emails sent out.	2512
Report – The client contract number is now added to the report “Jobs summary with Costs, assets and notes”	2241
Asset upload – improvements to ensure sites, locations are unique	2392
Custom Labels – Asset Tree view updates. Settings area now shows views by label	2438
Locations and Sublocation code - can show on Print Job and Task pdfs	2574
Purchase Order - new status Sent to Supplier	2442
Form Permission – can now turn off the Job’s form tab per user	1898
On Job complete with required forms can route user straight to form first.	2212
Sublocation Upload – checks for uniqueness of location name or code	2631
Deleting sites, locations, sublocations, job types. More checks before delete	2707
App – Other improvements	Ref.
List of assets within a job shows open jobs by default which can be filtered	2480
Guest Request App – French and Spanish text will now display correctly	2428
On job page, asset count now shows in asset panel	2463
Asset scans done from within an asset question on a form now updates scan history	2479
Requests sent for authorisation or authorised now show correctly in the Requests area	2489
Assets on asset question in form on app – display improved	2462
Add Form button on site, asset, location and job – now only shows the forms that are allowed to be sent as per the restriction settings in the main application	2590

Versions:

Main Web Application v23.11.0

New Mobile App v2.0.0

Manager app: 12.3.1 (No changes)
Resource app: 12.5.1 (No changes)
Requestor app: 2.3.5 (No changes)

Please note all app improvements and fixes are being made to the **New Mobile App**. Please move to the new app and away from the old apps as soon as possible.

<https://caf.m/article/how-do-i-get-the-apps/>

Release timetable

Date and Time of Release	Which Servers
18/12/2024 From 8pm (GMT)	app.trackplanfm.com app3.trackplanfm.com mydimomaintfm.cloud s****y.trackplanfm.com
17/12/2024 From 6pm (GMT)	App4.trackplanfm.com axxxk.trackplanfm.com h*****b.trackplanfm.com
18/12/2024 From 9am (GMT)	app2.trackplanfm.com

Coming Soon in Future Releases:	When
API Endpoints for Stock, Stock levels, Assets, Resources, Jobs, job costs	2025 Q1
Resource Contracts – can set multiple contracts for each resource with timeframes, sites and assets covered etc.	2025 Q1
Projects – Improvements including projects dashboard, project types	2025 Q1
Sites – New sites dashboard. New fields in a “Property Management” panel including, energy rating, CO2 emissions, Tenure, insurance band	2025 Q1
Spaces – To offer infinite hierarchy of locations within each site.	2025
Devices and Meter Readings, with Charts, Thresholds and PPM driven by readings.	2025
Room and Asset Booking	2025
Graphs and charts for Form results	2025
View and interact with PDFs and image. Great for seeing your assets on floorplans etc.	2025
Planned Maintenance - user and contractor can set dates and times for future planned maintenance schedules by sites and assets	2025

Key Features and Improvements - Details

Google Single Sign On enabled on main login page

Why is it useful?

Useful for clients who use Google as their internal directory as appose to Microsoft Azure. This allows the user to sign in using their Google email address.

Details:

Quite simple, activate Google SSO in Settings - Single Sign On Settings.

Stock Requests and Stock Transfers

Why is it useful?

These 2 new additions to our stock module will help clients, by giving users in the main application more control of their stock movements.

Details:

Stock Requests in the Stock Module:

A stock request is basically a request for 1 or more stock or non-stock items to be transferred from 1 storage area to another. This request can be sent to a user or a team for approval and can also be receipted or even partial receipted by the requestor.

Stock Transfers in the Stock Module:

A stock transfer is just a transfer of stock between 2 storage area. This can be accepted by a user or a team and can be receipted or even partial receipted by the person who requires the transfer.

In addition to this a user can transfer or request stock from the Stock tab on any Planned or Reactive job.

This is part 1 of this development and for now it is only available in the main web application. We would love to get some feedback from clients who may find this useful and may require this functionality in the Mobile app.

API – Endpoints added for sites

Why is it useful?

Useful for clients who may need to integrate with other systems to create and update details about their sites.

Details:

Chat to the support team for more information on setting up these connections.

support@trackplanfm.com

API calls.

- Retrieve a list of all sites for that client.
- Create a new site.
- Retrieve details for a specific site.
- Update the details for an existing site.

Resource Upload – can now upload trades, regions and grade for each resource

Why is it useful?

Very useful for clients with many Resources. The above information can now be bulk uploaded saving time for the user.

Details:

In the excel upload template, you can set one or multiple trades and regions. Also set the Grade/Ranking for that resource. This is all connected with the Resource Advanced Allocation Rules module in the settings area.

Note that the Trade names, region names and ranking must match what is already set up in the Settings area on the Trackplan system.

Settings – Site Regions

Settings – Resource Trades

Settings – Resource Ranking

Resource Details - The design is improved along with Resource Types

Why is it useful?

For ease of use we have redesigned the Resource details and added a new tab 'General Settings'. This separates the important resource information from their settings for better visibility.

Details:

Improvements can be found on the Resource Details page and on the Resource Types Details page.

Resource Types can be created and managed in Settings – Resource Types.

Location Type filter now added to location and sublocation lists

Why is it useful?

A small but useful feature to allow the user filter by Location Type in the location and sublocation grids.

Details:

Location Types can be created and managed in Settings – Location Types.

When editing a job can now change the main instructed task

Why is it useful?

For clients that are creating multiple tasks on a job, you now can edit the Job details page and set the Main Instructed Task for the job.

Details:

By default, the Main Instructed task is always the first task. Example – 30-001. Let's say, task 30-001 was sent to John the internal plumber. Johns' conclusion is that you need the local plumbing company, so you create 30-002 and send it to the external company. This second task is more important than Johns task so you can edit the job details screen and set 30-002 as the main task.

This then sets the external plumbing company as the main Resource on the job.

Resource can add and reassign other resources and reassign on a job task

Why is it useful?

A great feature for internal teams to add or reassign tasks via the mobile app.

Details:

Of course, this is a setting per Resource and Resource Type as not all clients would like this. This setting can be found via Settings – App Manager or the Manage Mobile App button on the Resource Details page, or in Settings – Resource Types.

The 2 settings are:

- Can Add Resource to Task
 1. No
 2. Can add Resource to task
 3. Can add Resource from their teams to task
- Can Remove Resource from Task

Stock – can restrict which storage areas a resource can access

Why is it useful?

Restricting the Resource so they can only see stock in certain storage area will hopefully reduce errors in stock usage and leave the storage area module in the app less cluttered.

Details:

Once again, we have new settings for this, and they can be found in the General Settings tab on the resource details page or in Settings – Resource Types.

The 2 settings are:

- Default Storage area
 1. A list of all your storage areas
- Storage Area Access
 2. None
 3. All
 4. Default Storage Area only
 5. Default Storage Area and storage area in their teams